APPENDIX D

USER VIEWS

The CMS system should present users with a "To Do Work List" which may be sorted either by party or by docket no. There will be several entry points into the CMS application. There will be a standard entry point for the use of investigators, and separate entry points for legal staff and the MDRR process. Supervisor views should provide supervisors with the Work Lists of their personnel so that workflow to staff can be monitored for problems and appropriate actions may be taken.

Below are some examples of user views desired by DCR. These views are merely conceptual sketches to assist the contractor to understand the "look and feel" of the user views desired by DCR and should be considered as a "storyboard". The concept for user operation is that each member of DCR'S staff will have a virtual workstation appropriate for his/her role and work responsibility. This standard virtual workstation will begin by displaying a worklist of cases by Docket Number, Complainant, Respondent, and other case attributes specified by DCR. Figure 3.5.01 shows such an example view.

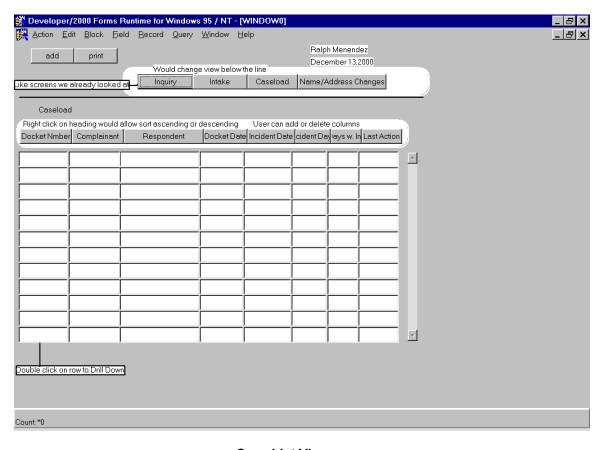


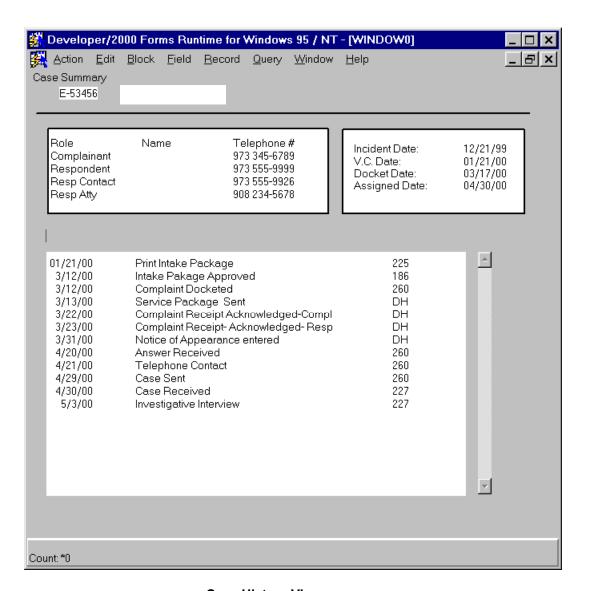
Figure 3.5.01

Case List View

Note that this view is one of two default user views. The other default view is the workflow engines "to do list". Also note that standard reports will be accessible from the default views (e.g. via buttons or tabs).

From the initial virtual workstation view, users can drill-down on any case to display further detail, such as case history, involved parties, etc. Figure 3.5.02 shows such an example view.

Figure 3.5.02

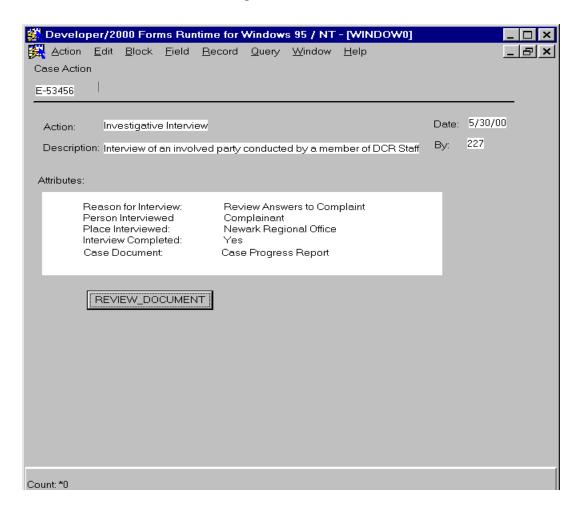


Case History View (A Drill-Down)

From the Case History View, the user can drill down on any line item to get a detailed Case Action View (see Figure 3.5.03).

One very important view for many users will be the Case Action View. This view identifies the specific attributes of any action taken on a case. The view also allows the user to view any document associated with the action. Figures 3.5.03 shows an example where the DCR investigator had to meet with complainant in order to review respondent's answers. The product resulting from that meeting is a Case Progress Report.

Figure 3.5.03



Case Action View

From the Case List View (Figure 3.5.01), users can also drill-down to display specific information, such as detailed data on parties. Figure 3.5.04 shows such an example view.

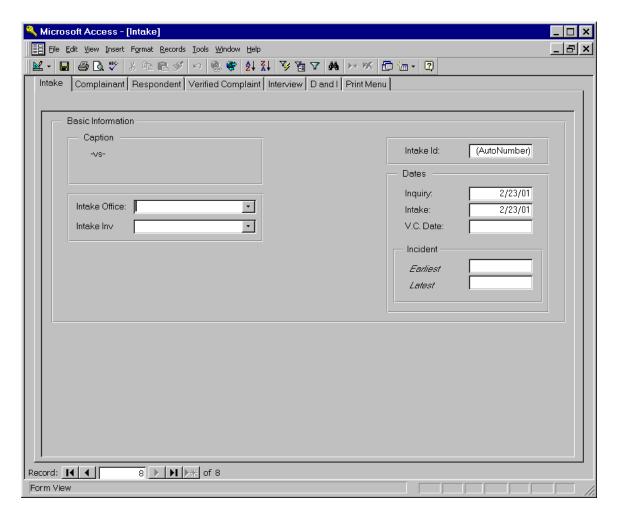
Developer/2000 Forms Runtime for Windows 95 / NT - [WINDOW0] Action Edit Block Field Record Query Window Help _ l리 × Role Title: First name: Last Name: Suffix: **▼** ▼ • \blacksquare • ▼ • \blacksquare • • • ▼ \blacksquare ▼ ▼ -END Street Address 1 Street Address 2 City, State, Zip: Count: *0

Figure 3.5.04

Involved Party Directory View

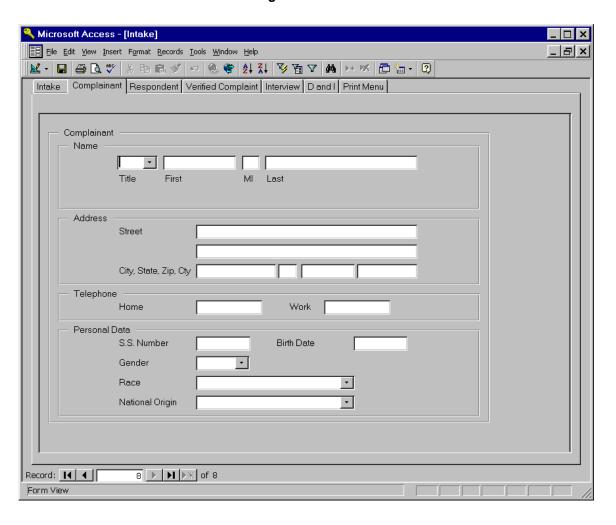
One very important set of forms used by the Intake Unit deals with entering data during an interview with complainant. As these data are developed, information is entered that leads to the determination of the laws applicable to a complainant's case. Figures 3.5.05 through 3.5.11 show examples of these.

Figure 3.5.05



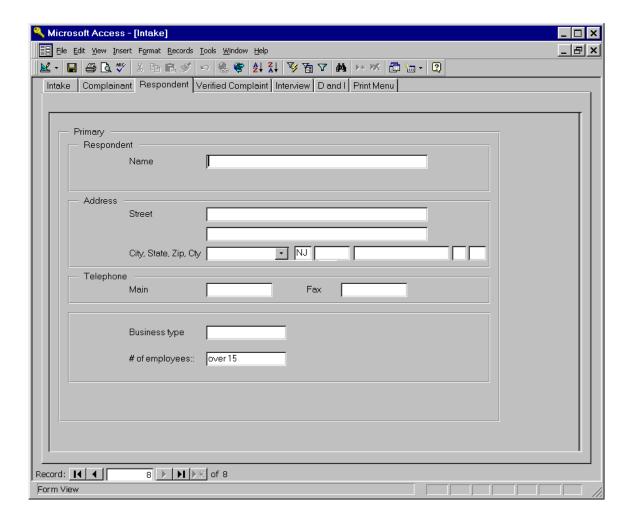
Intake TAB (Intake Process)

Figure 3.5.06



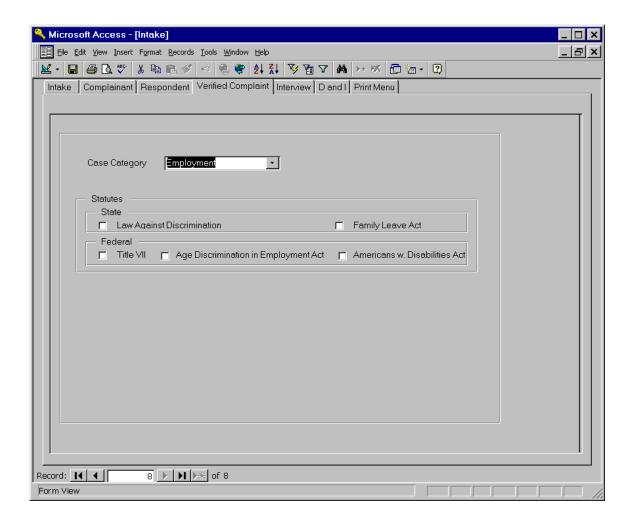
Complainant TAB (Intake Process)

Figure 3.5.07



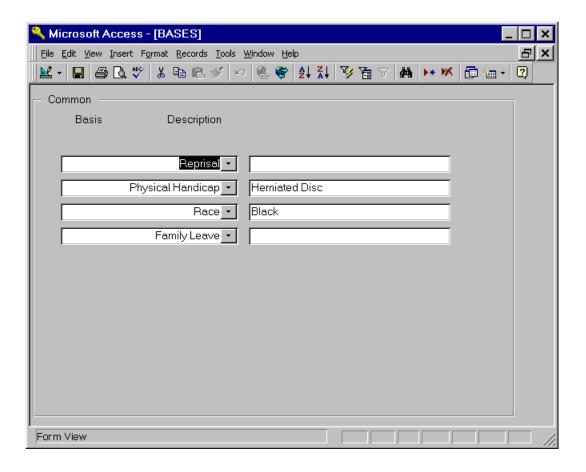
Respondent TAB (Intake Process)

Figure 3.5.08



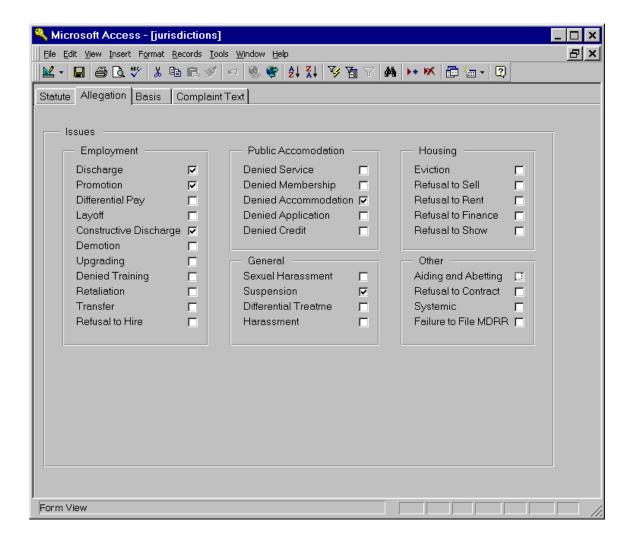
Verified Complaint TAB (Intake Process)

Figure 3.5.09



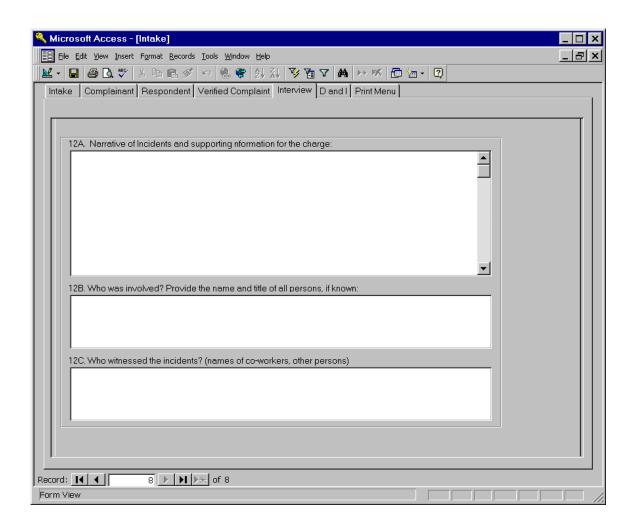
Complaint Bases Form (Called from Verified Complaint TAB) (Intake Process)

Figure 3.5.10



Allegation Form (Called from Verified Complaint TAB) (Intake Process)

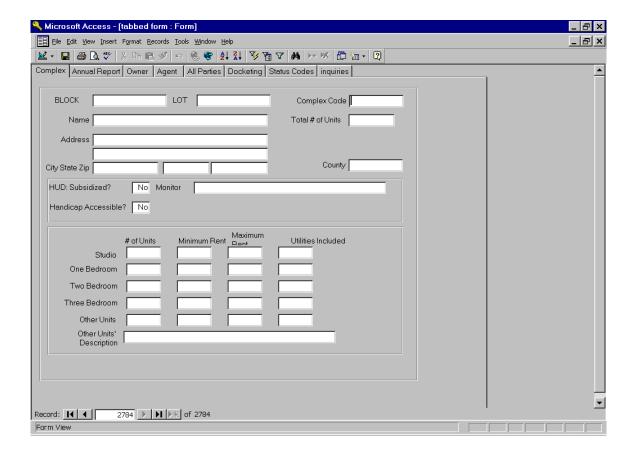
Figure 3.5.11



Interview TAB (Intake Process)

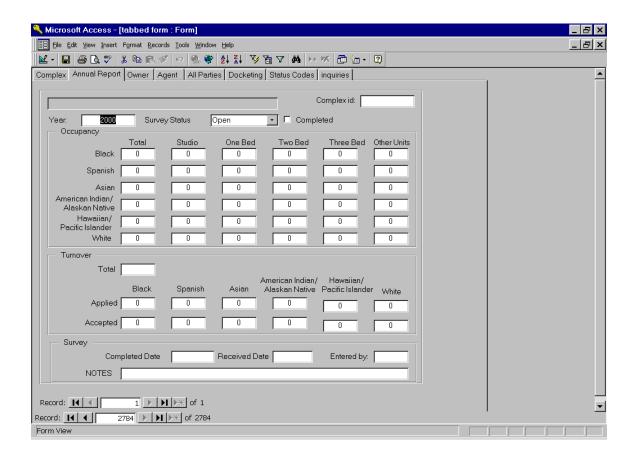
There will be views not directly related to the workflow process, but rather used for data entry and display purposes. An example of this is the MDRR process, which is used for identifying trends in multi-unit housing occupancy. The MDRR process has a few activities and will be primarily a data entry application. MDRR will not follow the workflow model used in investigating discrimination cases, but rather it has a separate workflow.

Figure 3.5.12



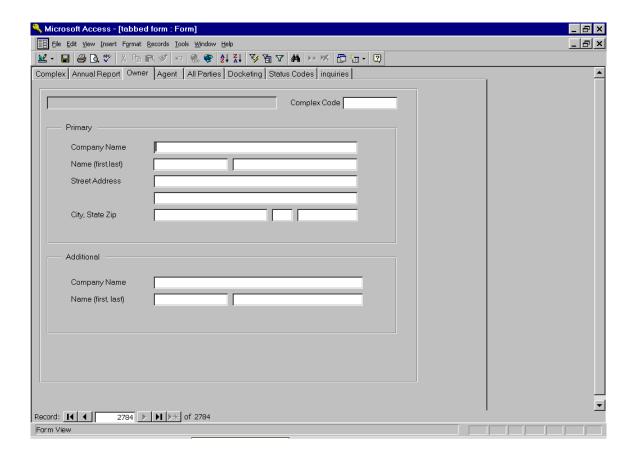
Housing Complex TAB (MDRR Process)

Figure 3.5.13



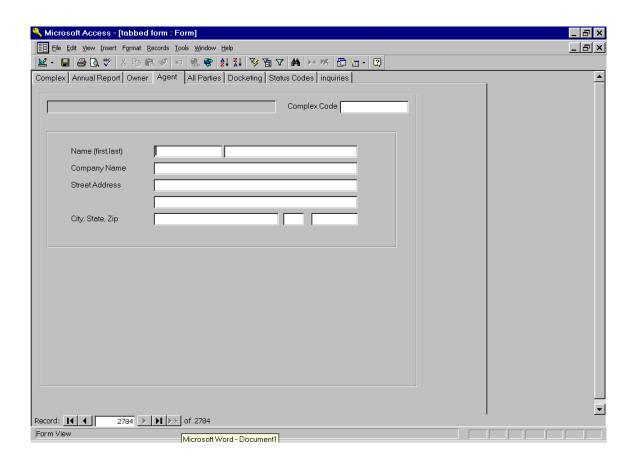
Annual Report TAB (MDRR Process)

Figure 3.5.14



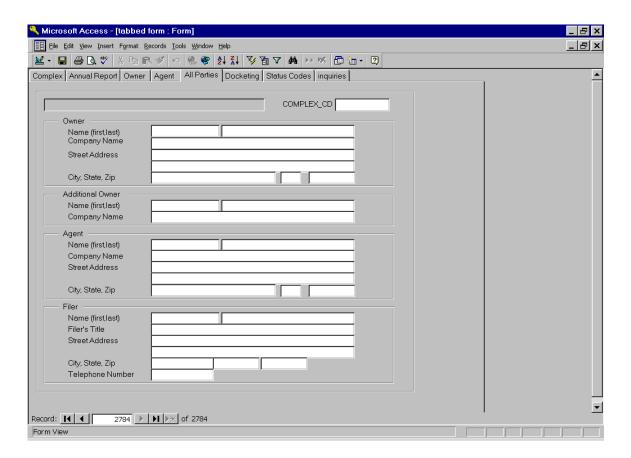
Owner Information TAB (MDRR Process)

Figure 3.5.15



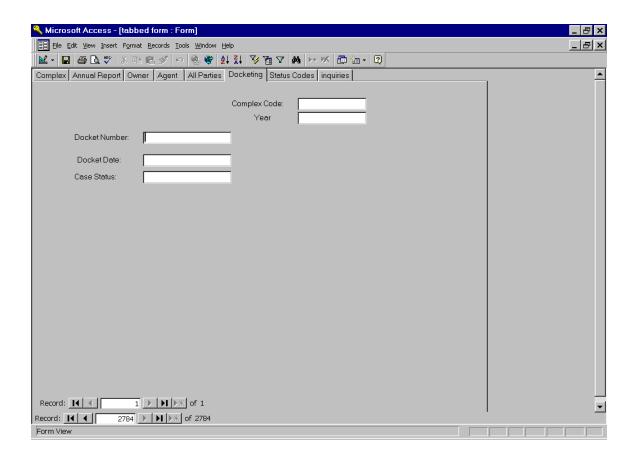
Agent Information TAB (MDRR Process)

Figure 3.5.16



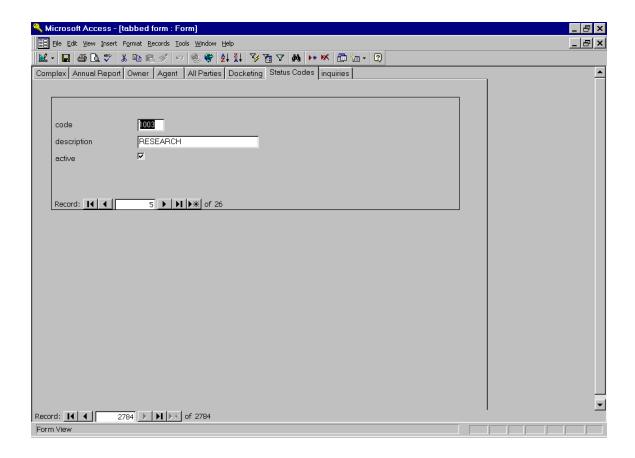
All Parties Information TAB (MDRR Process)

Figure 3.5.17



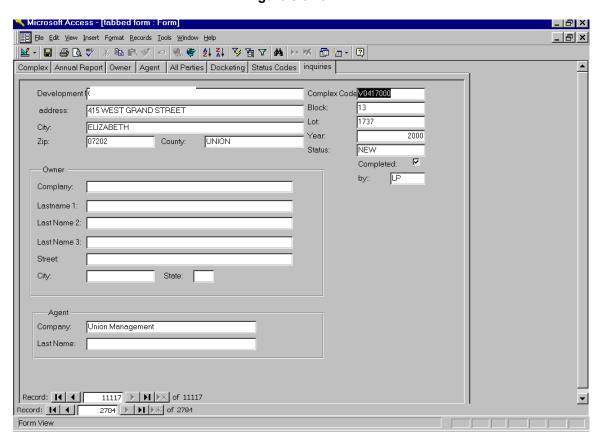
Case Docketing TAB (MDRR Process)

Figure 3.5.18



Case Status TAB (MDRR Process)

Figure 3.5.19



Inquiries TAB (MDRR Process)